

# **EXHIBIT 17**

## Message

**From:** Barney Pierce [barnaby@google.com]  
**Sent:** 10/26/2017 9:48:21 PM  
**To:** 🌐 APAC Display Community - Executive Committee 🌐 [apacdisplayexec@google.com]  
**Subject:** Fwd: DSP Advertiser Perception Report - US  
**Attachments:** 2017 PIR - DSP for Google Platforms 003.pdf

Sharing as I am sure this group would be interested in findings as well.

Thanks for passing this on @dantaylor

Cheers

Barney

----- Forwarded message -----

**From:** **Barney Pierce** <barnaby@google.com>  
**Date:** Wed, Oct 25, 2017 at 5:06 PM  
**Subject:** DSP Advertiser Perception Report - US  
**To:** ggcore <guycore@google.com>  
**Cc:** APAC-GTM-PD <apac-gtm-pd@google.com>

Hi there,

Sharing the 2017 **DSP Advertiser Perception Report** from the US in case you've not seen this already. Only US companies were surveyed but some interesting insights, especially as they relate to how we stack up against Amazon.

My high level summary if you don't want to read the report:

- Programmatic will eclipse 'Direct with online publisher' spending in 2018
- 8/10 customers are accelerating commitment or making programmatic a priority; only 5% reducing commitment
- Fraud, Brand safety continue to be biggest concerns for marketers
- Marketers trend towards bringing programmatic buying in house, but fewer marketers are actually exploring this option compared to previous years
- 7/10 buyers still heavily rely on Agency for programmatic buying
- What customers value most from their ADTECH partners: 1) Partnership/understanding of needs, 2) platforms functionality and 3) transparency; Google ranks well across these areas
- Only 25% of advertisers characterize DBM as a DSP; 29% think it's an adnetwork, 20% a DMP
- AAP (Amazon Ad Platform) and DBM are the most 'familiar' and 'used' DSP's; AAP ranking above DBM on both. DBM ranking higher than AAP when it comes to future purchase intention
- DBM, AAP lead on display and mobile, Tremor on Video
- Key factors driving DSP selection: Audience scale/reach, API and integrations, Troubleshooting/QA; DBM leading across these areas; AAP not far behind though.
- Quality of post ad campaign evaluations and insights is another critical driver of DSP selection; DBM leads, closely followed by AAP
- What advertisers value the most for their DSP: Make it easy to work with, be responsive and tech expertise. DBM is top for tech expertise, but well below competitors for responsiveness and being easy to work with.
- AAP is the most preferred DSP, followed by DBM

Cheers  
Barney

Barney Pierce

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Barney Pierce

Director, Platforms and Display Go To Market , APAC

+61 412 096 386 | [barnaby@google.com](mailto:barnaby@google.com)

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# DSP Report, Wave 3

*Part of the Programmatic Intelligence Report Portfolio*

2017



**What Advertisers Think™**

The More You Know  
The Stronger Your Brand  
The More You'll Sell™

# Methodology and Respondent Profiles

	Representing Top 200 Advertisers in the U.S.	Leading Ad Categories	700+ Key Decision Makers
Programmatic Adoption & Attitudes	  	<ul style="list-style-type: none"><li>• Automotive</li></ul>	<ul style="list-style-type: none"><li>• Sample: Marketer and Agency contacts from The Advertiser Perceptions Media Decision Maker Database and third-party databases as needed.</li></ul>
Demand Side Platforms	  	<ul style="list-style-type: none"><li>• Parenthood Related</li><li>• Consumer Electronics</li></ul>	<ul style="list-style-type: none"><li>• Main Qualification: Involved in the purchase of programmatic advertising; Used or Worked with DSPs, DMPs, or Managed Services in past year.</li></ul>
Data Management Platforms	  	<ul style="list-style-type: none"><li>• Consumer Packaged Goods</li><li>• Education</li></ul>	<ul style="list-style-type: none"><li>• <b>Fielded: June 2017</b></li><li>• Incentives include cash &amp; data</li></ul>
Managed Services	  	<ul style="list-style-type: none"><li>• Entertainment</li><li>• Financial Products/Services</li></ul>	<p>Respondents totals:</p> <ul style="list-style-type: none"><li>• <b>N=364 DSP Report</b></li><li>• N=327 DMP Report</li><li>• N=294 Managed Services Report</li></ul>
Digital Marketing Hubs	  	<ul style="list-style-type: none"><li>• Home &amp; Appliance</li><li>• Liquor, Beer and Wine</li></ul>	<p>Ranging in title:</p> <ul style="list-style-type: none"><li>• 49% VP and above</li><li>• 36% Director/Supervisor</li><li>• 15% Manager/Planner/Buyer</li></ul>
Summary	  	<ul style="list-style-type: none"><li>• Apparel/Fashion</li><li>• Toiletries &amp; Cosmetics</li></ul>	
Appendix	  	<ul style="list-style-type: none"><li>• Pharmaceuticals</li><li>• Quick Service Restaurants</li></ul>	<p>Expressing opinions from:</p> <ul style="list-style-type: none"><li>• 48% Agencies</li><li>• 52% Marketers</li></ul>
	  	<ul style="list-style-type: none"><li>• Retail</li><li>• Technology</li></ul>	
	  	<ul style="list-style-type: none"><li>• Telecommunications</li><li>• Travel</li></ul>	

# Programmatic eclipsing direct spending

Allocation of Digital/Mobile Advertising  
Average Percent

Marketplace Overview

Demand Side Platforms

Data Management Platforms

Managed Services

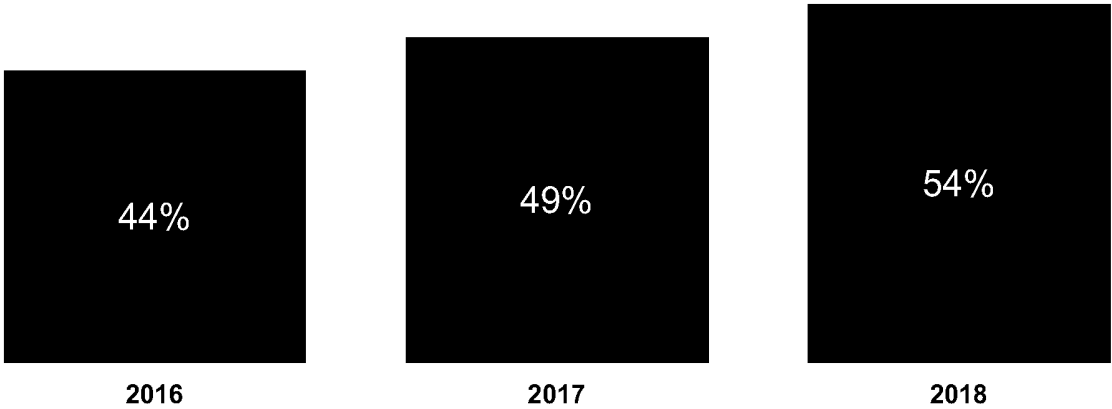
Digital Marketing Hubs

Summary

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Direct with Online  
Publisher

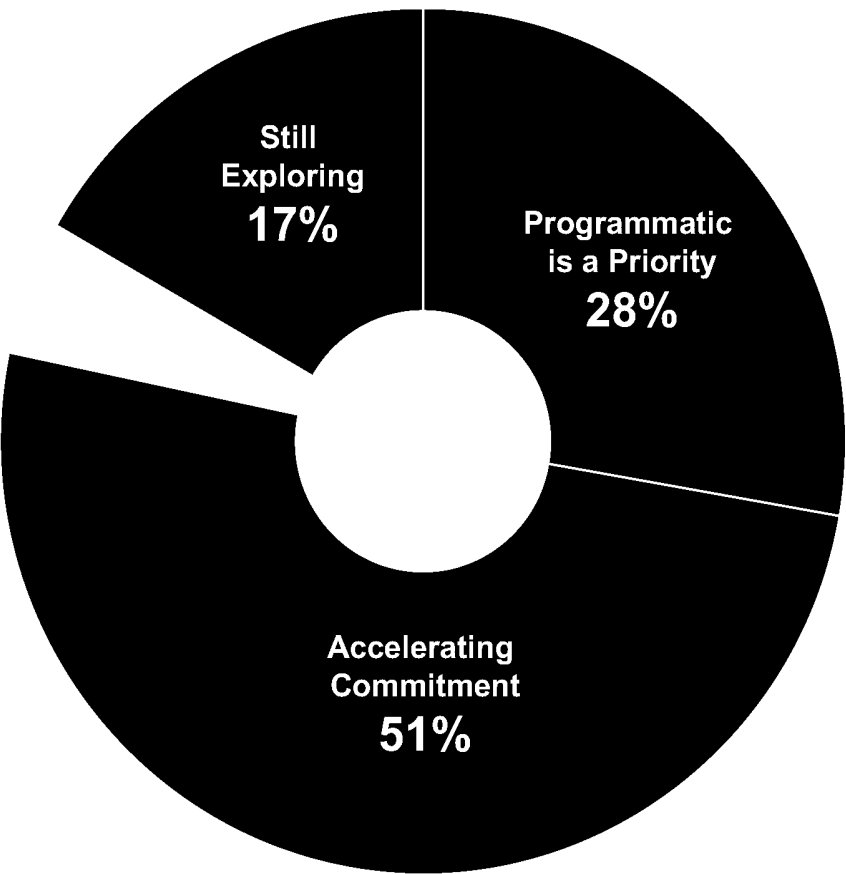
■ Programmatic



Q: What percent of your digital/mobile advertising spend went to each last year (2016)? How much are you allocating to each this year (2017)? How do you expect your spend to be allocated next year (2018)?  
Base: Total Programmatic Respondents

# 8 out of 10 are accelerating or making programmatic a priority

Characterization of Attitude Towards Programmatic Advertising  
Percent of Respondents



Q: How would you characterize your current attitude toward programmatic?  
Base: Total Programmatic Respondents

Marketplace Overview

Demand Side Platforms

Data Management Platforms

Managed Services

Digital Marketing Hubs

Summary

Appendix

# Agencies and marketers now in sync on advantages of programmatic: Better targeting, data, efficiency

Top Issues Programmatic Ad Buying Solves (Rank 1-3)  
Percent of Respondents

- Programmatic Adoption & Attitudes
- Demand Side Platforms
- Data Management Platforms
- Managed Services
- Digital Marketing Hubs
- Summary
- Appendix

AGENCIES		% Point Change from Prior Wave	
1	Improved targeting capabilities	41%	+1
2	Better control of data, audiences and tactics	36%	-2
3	More cost efficient than publisher direct	35%	0
4	Better time and resource efficiency	34%	+1
5	Broader reach	25%	-4
6	Price transparency	23%	0
7	Better in-flight optimization	22%	N/A
8	Simplifies the RFP process	16%	-2
9	More creative options	14%	-8
10	Agency revenue driver	13%	-6

MARKETERS		% Point Change from Prior Wave	
1	Improved targeting capabilities	47%	+9
2	Better control of data, audience & tactics	37%	+1
3	Better time and resource efficiency	36%	+1
4	Broader reach	32%	0
5	More cost efficient than publisher direct	31%	0
6	Offers unique targeting data/opportunities	30%	N/A
7	More creative options	22%	-8
8	Simplifies the RFP process	22%	-1
9	Better in-flight optimization	21%	N/A
10	Price transparency	20%	-8

Q: Which of the following are the top issues that programmatic ad buying helps solve?  
Base: Total Programmatic Respondents



# Biggest concerns about programmatic? Fraud, brand safety, verification

Most Negative Aspects of Programmatic Ad Buying (Rank 1-3)  
Percent of Respondents

% Point Change  
from Prior Wave

1	Fraud	39%	+12 ↑
2	Brand safety	26%	+9 ↑
3	Verification issues	25%	+3
4	Lack of human interaction	21%	-1
5	Placement transparency	20%	+1
6	Poor inventory quality	20%	+1
7	Client education gap (knowledge of programmatic)	17%	+1
8	Pricing transparency	17%	0

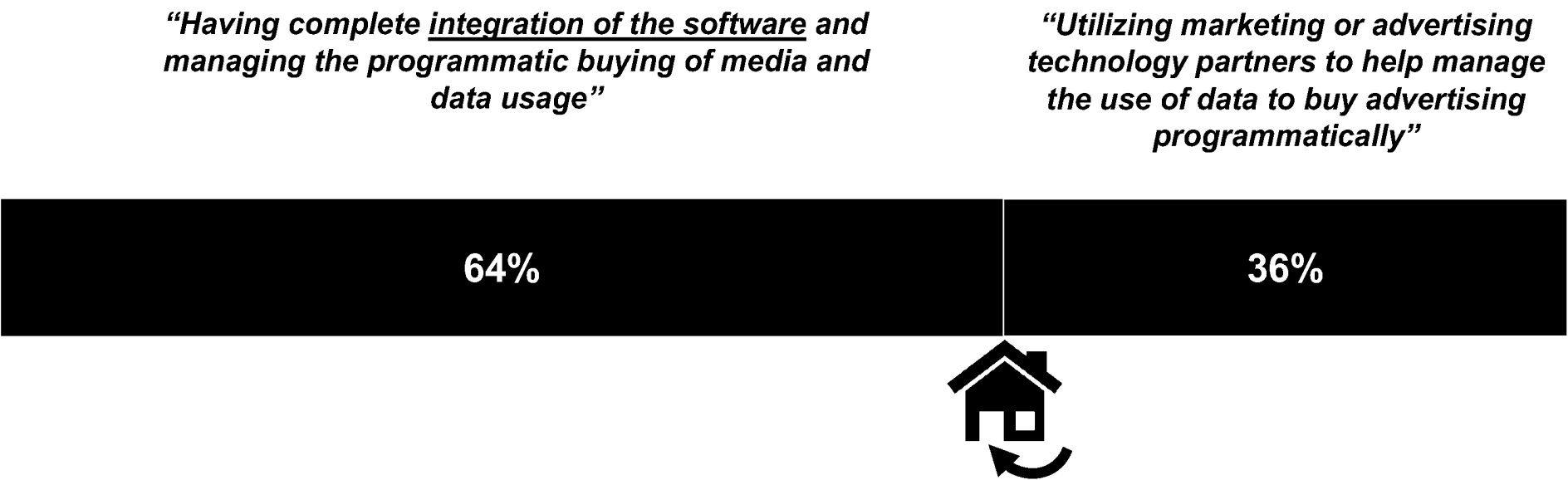
Programmatic Adoption & Attitudes
Demand Side Platforms
Data Management Platforms
Managed Services
Digital Marketing Hubs
Summary
Appendix

Q: Which of the following are the most negative aspects of programmatic ad buying?  
Base: Total Programmatic Respondents

# In-house: most marketers see it as software integration over managed service

Definition of Bringing Programmatic Buying “In-House”  
Percent of Marketer Respondents

- Programmatic Adoption & Attitudes
- Demand Side Platforms
- Data Management Platforms
- Managed Services
- Digital Marketing Hubs
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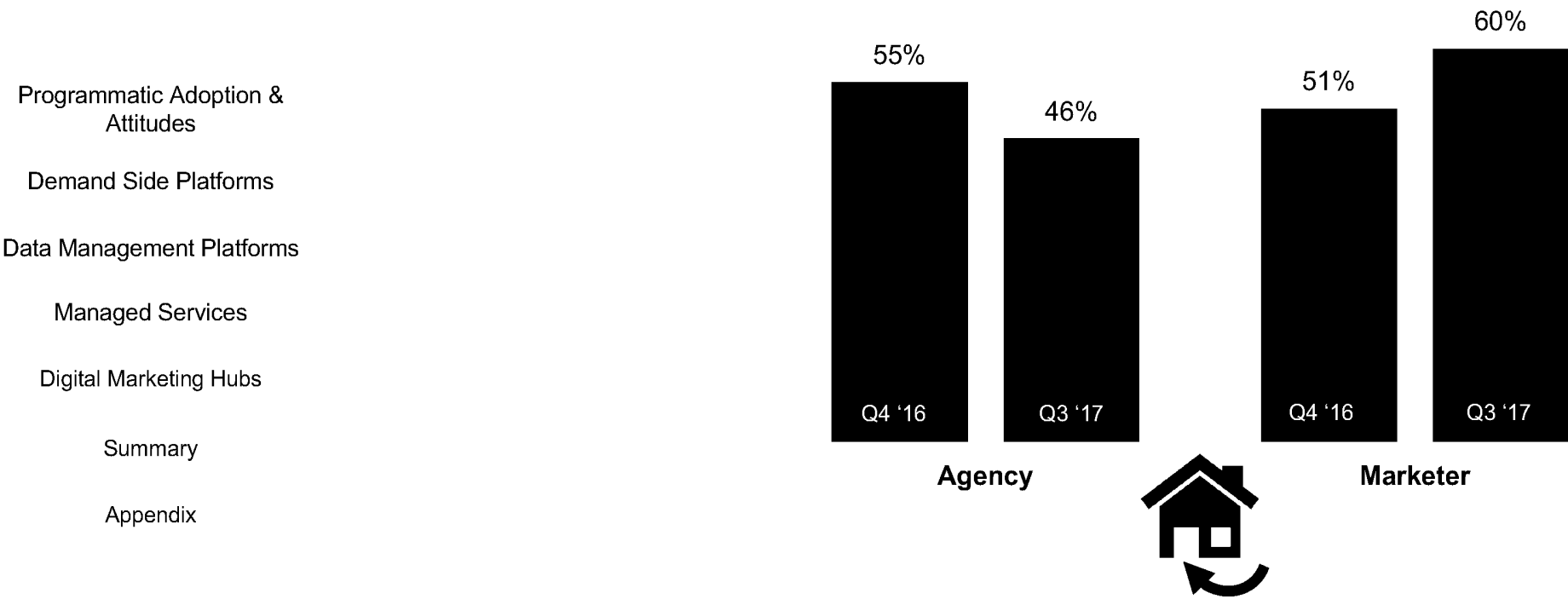


Q: Which of the following would you use to define what it means to bring programmatic buying “in-house”?  
Base: Marketers Exploring or Committed to Bringing Buying In-House

# Outsourcing will it move in-house?

## Marketers—*more than agencies*—lean to ‘yes’

“Advertisers/marketers will increasingly bring programmatic buying in-house and out of the hands of agencies.”  
Percent Agree with Statement (4-5)



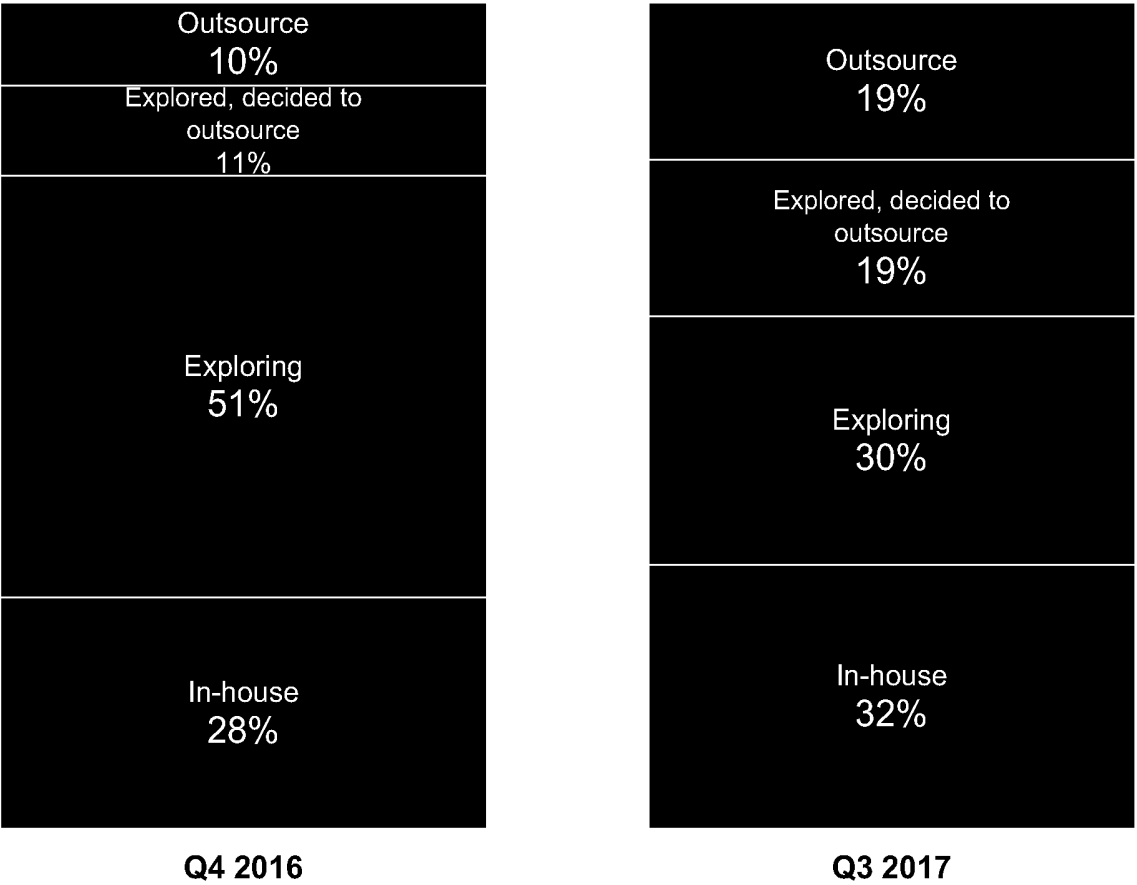
- Programmatic Adoption & Attitudes
- Demand Side Platforms
- Data Management Platforms
- Managed Services
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Q: Please indicate how strongly you either agree or disagree with each of the following statements regarding programmatic buying overall. (5 point scale, where 1=Strongly Disagree and 5=Strongly Agree)  
Base: Total Programmatic Respondents

# Trend toward in-house? Indeed, but fewer marketers are exploring

Resourcing for Programmatic  
(Percent of Marketers)

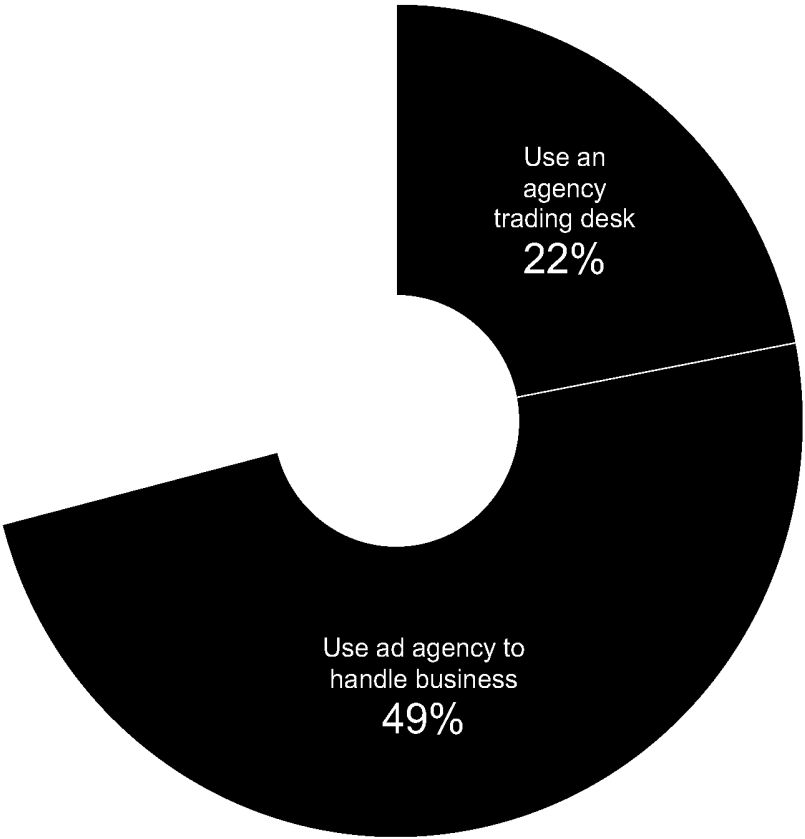
- Programmatic Adoption & Attitudes
- Demand Side Platforms
- Data Management Platforms
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Q: Which of these situations applies to you in terms of your level of committing funds and resources to bring programmatic buying in-house?  
Base: Marketers

# To what degree are marketers relying on agencies for programmatic buying? 7 of 10

How Programmatic Media-Buying Is Conducted  
Percent of Marketer Respondents



Q: For programmatic media-buying, which of the following ways do you conduct trading?  
Base: Marketers Involved in Programmatic

# When advertisers think of ad tech partners, what do they want most?

## Collaboration, technology, transparency



Q: Thinking of ad tech partners in general, what do you most want from the company you work with in terms of creating the best possible ad tech implementation for you to achieve your programmatic advertising goals?  
Q: Which single company (media brand or ad tech brand) does the best job?  
Base: Total Programmatic Respondents

# A Rose is a Rose: What's in a Name?

- How advertisers think of the LumaScape categories

A rose by any other name . . . DSPs

Programmatic Adoption & Attitudes

Demand Side Platforms






Data Management Platforms








Managed Services

Digital Marketing Hubs

Summary

Appendix

Generally Accepted List of DSPs	
 Adobe Advertising Cloud Formerly  TubeMogul	 DoubleClick Bid Manager <small>by Google</small>
amazon	
AppNexus	 DSP
Bidtellect	
BrightRoll <small>by YAHOO!</small>	
centro	theTradeDesk
criteo	TREMOR VIDEO
DataXu <small>Data. Insight. Action.</small>	TURN
drawbridge	VIAANT.
dstillery	

Advertiser Characterization of DSPs	
 DoubleClick Bid Manager <small>by Google</small>	25%
	24%
BrightRoll <small>by YAHOO!</small>	22%
	21%
TURN	20%
DataXu	19%
	19%
theTradeDesk	19%
amazon	18%
AppNexus	18%
 Adobe Advertising Cloud Formerly  TubeMogul	17%
 DSP	16%
ORACLE bluekai	15%

% of Respondents

Only 1-in-4 advertisers characterize DoubleClick Bid Manager as a DSP

Not a DSP







Not a DSP

Q100a: How would you characterize the following brands?  
Base: Total Programmatic Respondents



# Advertisers just don't know how to characterize certain brands

- Programmatic Adoption & Attitudes
- Demand Side Platforms
- Data Management Platforms
- Managed Services
- Digital Marketing Hubs
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	% of respondents stating "I don't know"
 accordantmedia	39%
	37%
	37%
	36%
	34%
	34%
	34%
	33%

Q100a: How would you characterize the following brands?  
Base: Total Programmatic Respondents

# What do people think DBM is?

- Programmatic Adoption & Attitudes
- Demand Side Platforms
- Data Management Platforms
- Managed Services
- Digital Marketing Hubs
- Summary
- Appendix

% of respondents		
1	Ad Network	29%
2	DSP	25%
3	DMP	20%
4	DMH	18%
5	ATD	17%
6	SSP	15%
7	Managed Service	15%
8	Other/Don't Know	10%

Q100a: How would you characterize the following brands?  
Base: Total Programmatic Respondents

# Demand Side Platforms

- Familiarity: AAP and DBM continue to lead
- DBM and AAP still the most used DSPs
  - Future intentions: DBM and AAP in their own tier at the top
- What drives DSP selection? Audience scale is key
  - DBM leads across board in top 3 selection criteria
- Quality of campaign analysis is a critical driver of selection
  - DBM ahead of competitors in post-ad campaign
- Ease of working relationship with DSP a key factor for advertisers, but challenge for DBM
- Who is the most preferred DSP? AAP, followed by DBM
- TTD, AAP, DBM in cluster for Net Promoter Score leadership

# Demand Side Platforms Measured



criteo

OpenX

amazon

DataXu  
Data. Insight. Action.

rocketfuel

theTradeDesk

Programmatic Adoption & Attitudes

AppNexus

drawbridge

TREMOR  
VIDEO

Demand Side Platforms

dstillery

*is a company that allows advertising clients to buy digital media on several different selling systems, or exchanges, through one interface.*

Data Management Platforms

Bidtellect

DoubleClick  
Bid Manager by Google

TURN

Managed Services

BrightRoll  
by YAHOO!

MediaMath

VIAANT.

Digital Marketing Hubs

Summary

centre

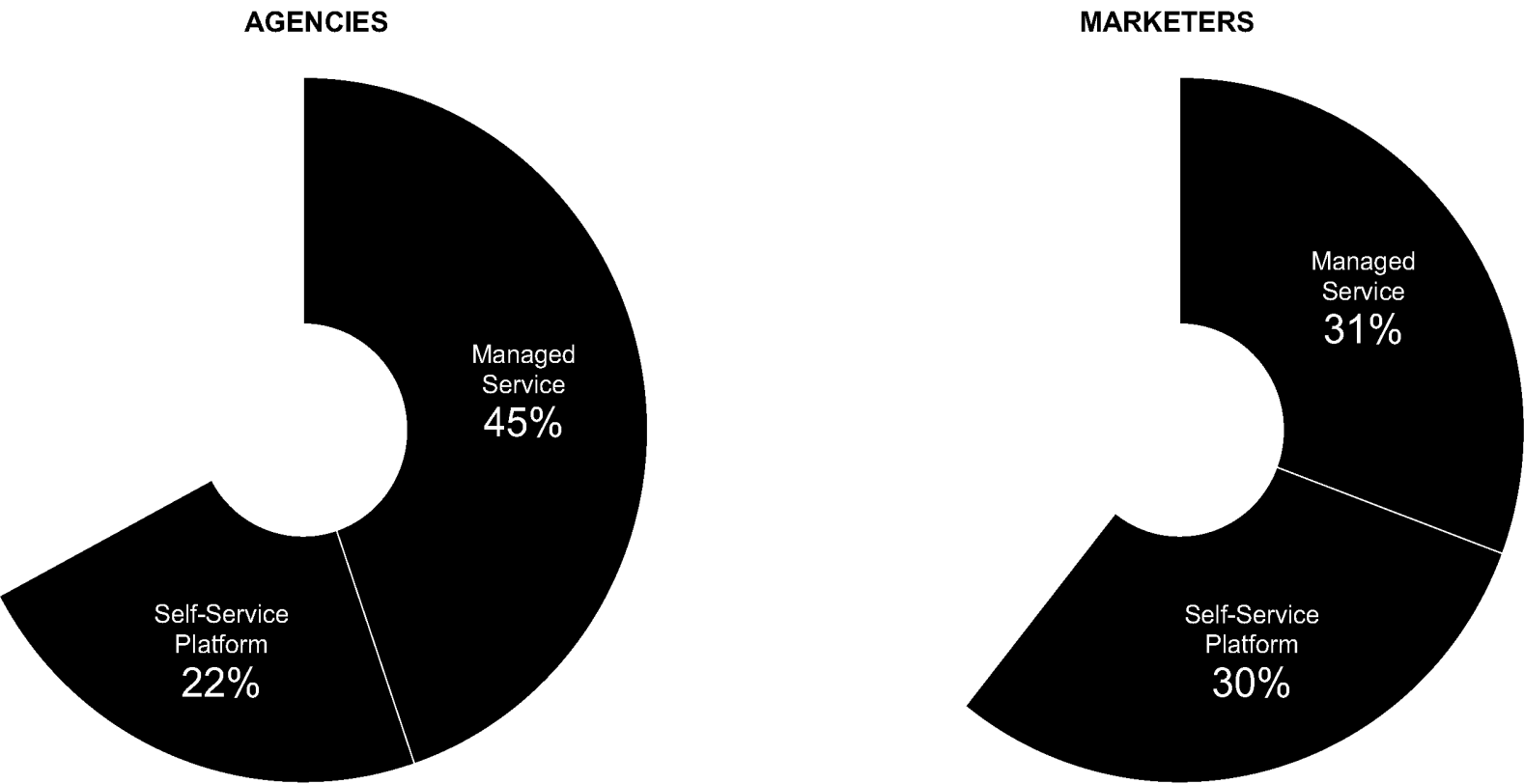
1 DSP  
by AOL

videology

Appendix

# Self-serve or managed service approach? Marketers evenly split Agencies lean on partners to manage programmatic for them

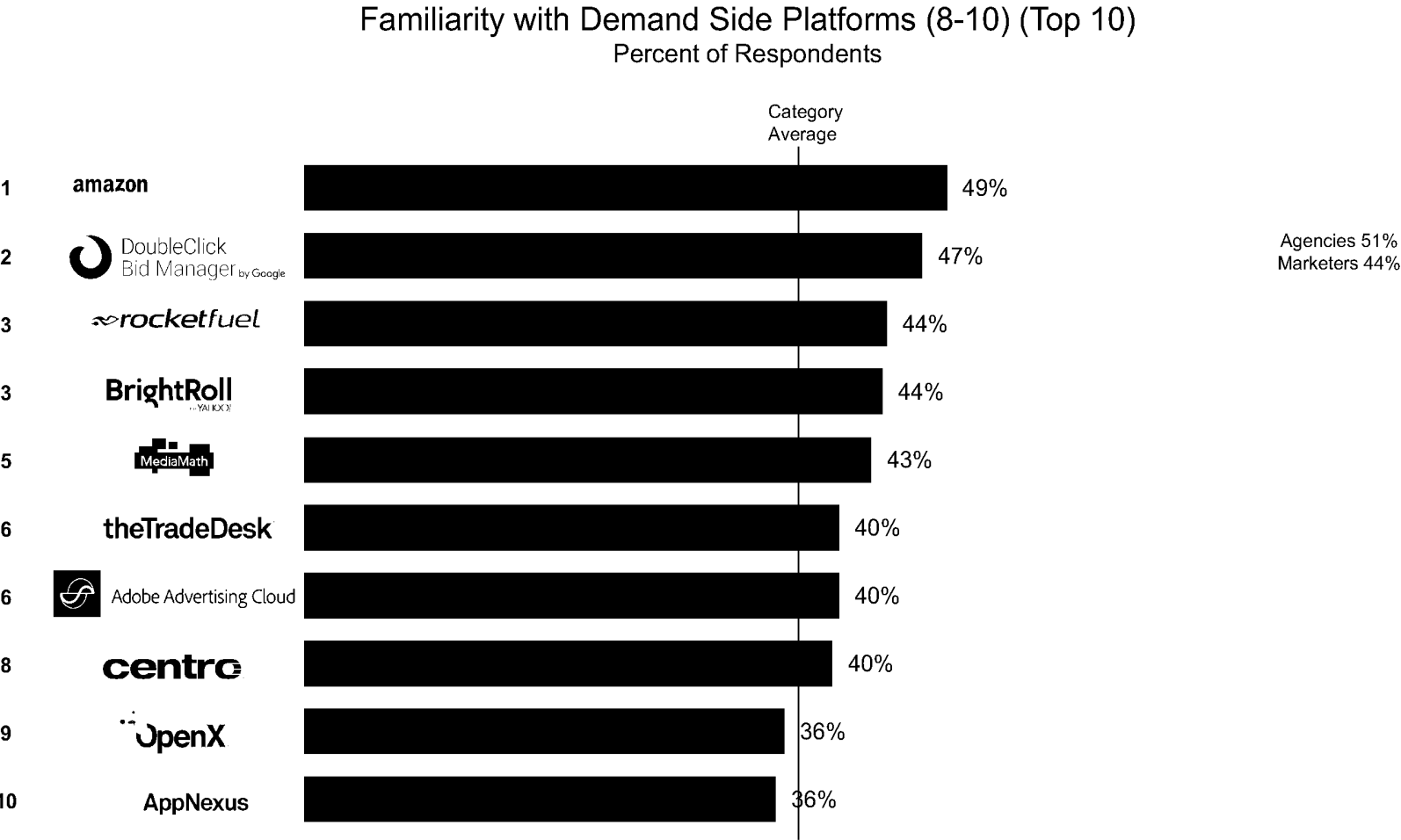
How Demand Side Platforms Are Used  
Percent of Respondents



Q: In what way do you use DSPs?  
Base: Use Demand Side Platforms

# Familiarity: AAP and DBM continue to lead

- Marketplace Overview
- Programmatic Adoption & Attitudes
- Data Management Platforms
- Managed Services
- Digital Marketing Hubs
- Summary
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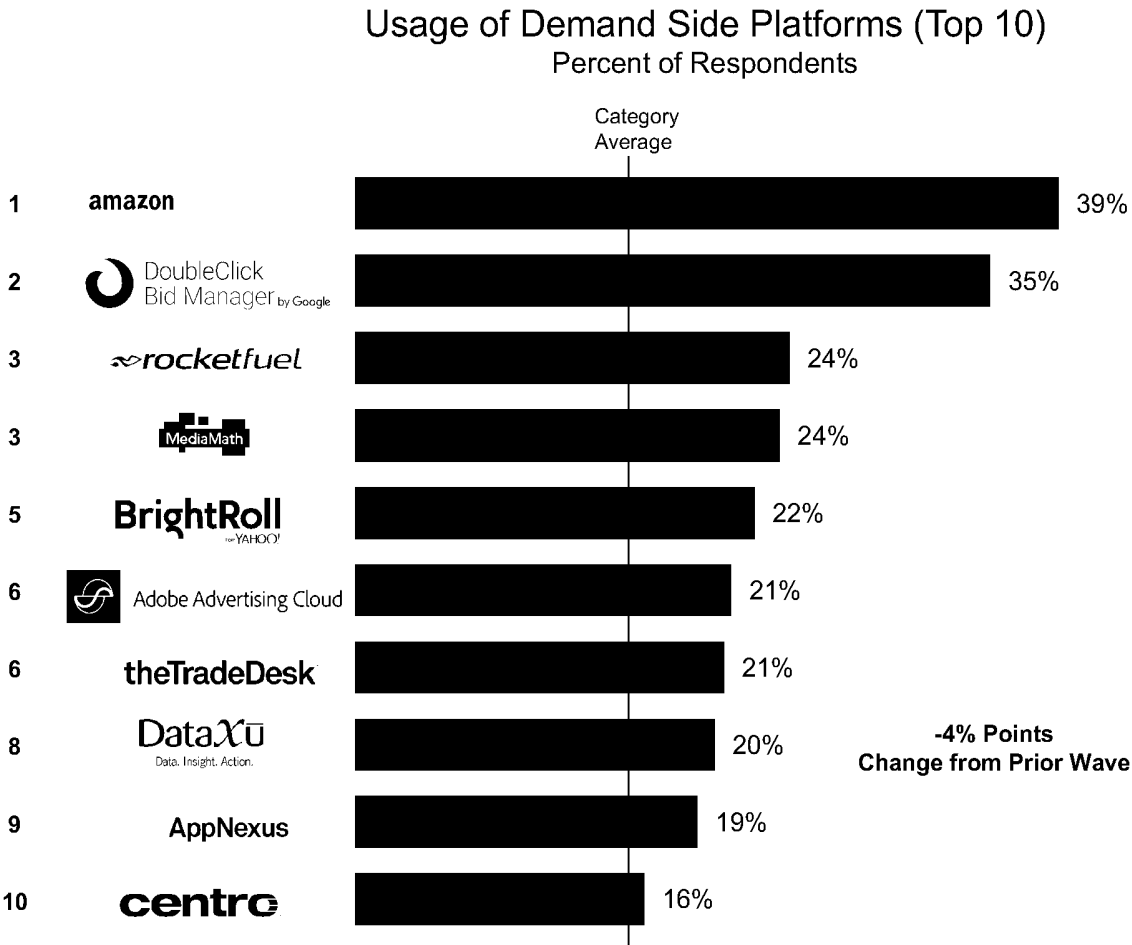


Q: How familiar are you with each of the following Demand Side Platforms (DSPs)?  
Base: Use Demand Side Platforms

# DBM and Amazon most used DSPs

- Programmatic Adoption & Attitudes
- Demand Side Platforms
- Data Management Platforms
- Managed Services
- Digital Marketing Hubs
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Average Number of DSPs used in past year?



Q: Which of these Demand Side Platforms (DSPs) you said you are familiar with have you used in the past year?  
Base: Use Demand Side Platforms

# AAP and DBM: Significant lead in agency usage

Usage of Demand Side Platforms (Top 10)  
Percent of Respondents

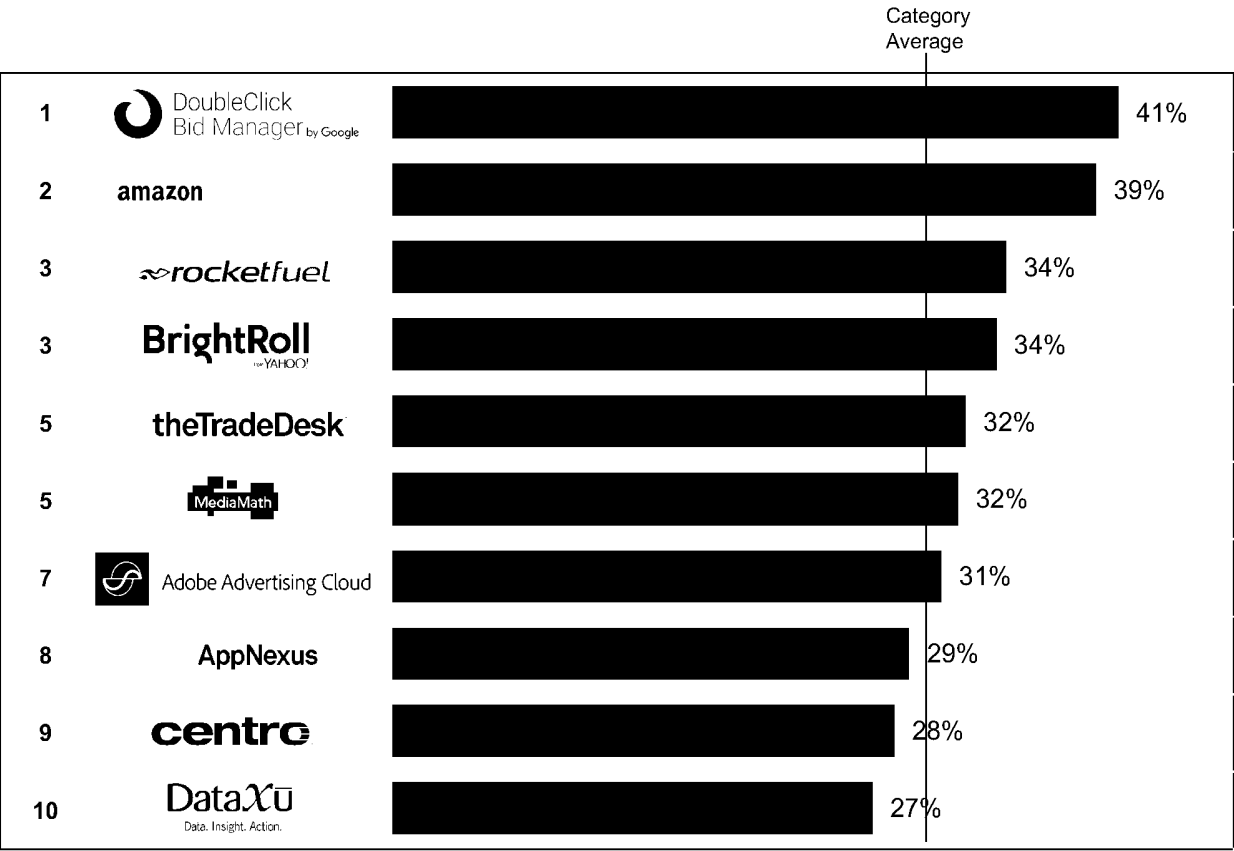
	AGENCIES				MARKETERS			
				% Point Change from Prior Wave				% Point Change from Prior Wave
Programmatic Adoption & Attitudes  Demand Side Platforms  Data Management Platforms  Managed Services  Digital Marketing Hubs  Summary  Appendix	1	 DoubleClick Bid Manager <small>by Google</small>	37%	-2	1	amazon	44%	-1
	1	amazon	37%	-1	2	 DoubleClick Bid Manager <small>by Google</small>	35%	1
	3	 rocketfuel	28%	-3	3	 MediaMath	22%	-3
	4	 MediaMath	25%	-2	3	rocketfuel	22%	-1
	4	theTradeDesk	25%	0	5	BrightRoll <small>by YAHOO!</small>	21%	0
	4	 Adobe Advertising Cloud	25%	-2	6	AppNexus	19%	-3
	7	BrightRoll <small>by YAHOO!</small>	23%	-1	6	DataXu <small>Data. Insight. Action.</small>	19%	-5
	8	DataXu <small>Data. Insight. Action.</small>	22%	-4	8	 Adobe Advertising Cloud	18%	0
	9	centre	20%	-1	9	theTradeDesk	17%	0
	10	TURN	19%	-3	10	 videology	15%	-3

Q: Which of these Demand Side Platforms (DSPs) you said you are familiar with have you used in the past year?  
Base: Use Demand Side Platforms



# Future intentions: DBM & AAP gaining on next tier

Purchase Intention of Demand Side Platforms (8-10) (Among Top 10 Used)  
Percent of Respondents



Programmatic Adoption & Attitudes

Demand Side Platforms

Data Management Platforms

Managed Services

Digital Marketing Hubs

Summary

Appendix

Q: How likely are you to actually use each of the Demand Side Platforms (DSPs) you said you are considering for use in the coming year?  
Base: Use Demand Side Platforms

# AAP & DBM lead in display and mobile

Demand Side Platform Usage Among Ad Type/Format (Top 10 Overall)  
Percent of Respondents

	Display		Mobile		Video	
Marketplace Overview	1	DoubleClick Ad Manager by Google	54%	1	amazon	50%
	2	1 DSP by AOL	54%	2	DoubleClick Ad Manager by Google	49%
	3	amazon	51%	3	MediaMath	42%
	4	rocketfuel	44%	4	rocketfuel	39%
Programmatic Adoption & Attitudes	5	theTradeDesk	43%	5	Adobe Advertising Cloud	37%
	5	MediaMath	43%	6	theTradeDesk	36%
Data Management Platforms	8	DataXu Data. Insight. Action.	39%	6	1 DSP by AOL	36%
	9	centre	37%	8	AppNexus	35%
Managed Services	9	OpenX	37%	8	centre	35%
	10	TURN	37%	9	DataXu Data. Insight. Action.	34%
Digital Marketing Hubs						
Summary						
Appendix						

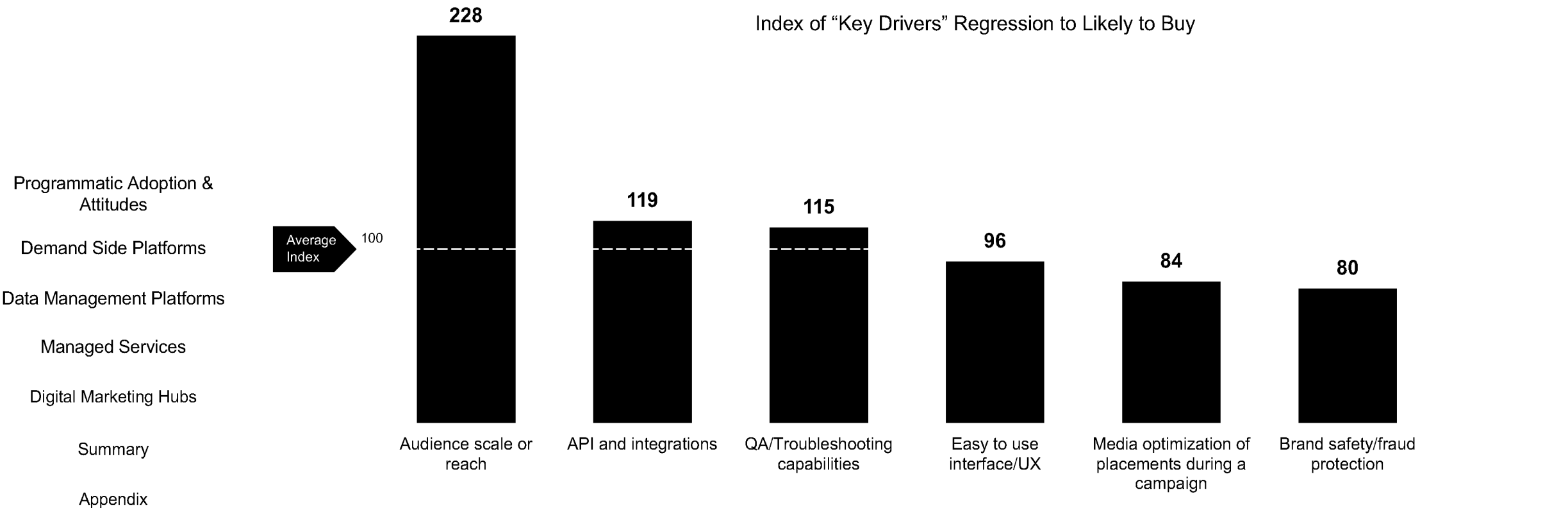
Agencies 51%  
Marketers 39%

Q: For which type of advertising would you use each Demand Side Platform (DSP) you are familiar with?  
Base: Familiar with Demand Side Platform (Variable Base)

# Determining drivers influencing plans to use DSPs

Programmatic Adoption & Attitudes	<b>Selection Criteria:</b> <ul style="list-style-type: none"><li>• API and integrations</li><li>• Forecasting tools</li><li>• Media optimization of placements during a campaign</li><li>• QA/Troubleshooting capabilities</li><li>• Reporting features</li><li>• Identity management</li></ul>	<b>Analytics and Insights:</b> <ul style="list-style-type: none"><li>• Thought leadership (white papers, articles on insights about market, technology, applications)</li><li>• Audience analytics reporting</li><li>• Quality of post ad campaign evaluation, insights, recommendations</li><li>• Quality of training and application QA</li><li>• Innovation and roadmap insight</li></ul>
Demand Side Platforms	<ul style="list-style-type: none"><li>• Marketplace quality (including verification partner integrations – white lists, black lists, brand safety, fraud, etc.)</li></ul>	
Data Management Platforms	<ul style="list-style-type: none"><li>• Audience scale or reach</li></ul>	<b>Sales and Support:</b> <ul style="list-style-type: none"><li>• Technology expertise</li><li>• Understanding of client goals, needs</li><li>• Responsiveness to client needs during and post implementation</li><li>• Is easy to work with</li></ul>
Managed Services	<ul style="list-style-type: none"><li>• Audience targeting capabilities</li><li>• Margin/budget management tools</li></ul>	
Digital Marketing Hubs	<ul style="list-style-type: none"><li>• Easy to use interface/UX</li></ul>	
Summary		
Appendix	<p>Q: How likely are you to actually use each of the Demand Side Platforms (DSPs) you said you are considering for use in the coming year?</p> <p>Base: Total Respondents</p> <p>Q: How would you rate each Demand Side Platform (DSP) on the following criteria?</p> <p>Q: Based on your own experience, please rate each Demand Side Platform's (DSP's) research and insights efforts in communicating its value as an advertising vehicle at each stage in the campaign.</p> <p>Q: Based on your own experience, please rate each Demand Side Platform's (DSP's) sales team based on the following sales capabilities.</p> <p>Base: Considering Demand Side Platform in the Coming Year (Variable Base)</p> <p><b>Regression Analysis is a statistical method designed to derive the relationship between characteristics and/or behaviors. Advertiser Perceptions utilizes regression analysis to show relationships between selection criteria and their influence on plans to buy. The analysis determines which criteria have the greatest impact on achieving the desired results.</b></p>	

# What drives DSP selection? Audience scale is key



Programmatic Adoption & Attitudes

Demand Side Platforms

Data Management Platforms

Managed Services

Digital Marketing Hubs

Summary

Appendix













Q: How likely are you to actually use each of the Demand Side Platforms (DSPs) you said you are considering for use in the coming year?  
Base: Total Respondents

Q: How would you rate each Demand Side Platform (DSP) on the following criteria?  
Base: Considering Demand Side Platform in the Coming Year (Variable Base)

**Regression Analysis is a statistical method designed to derive the relationship between characteristics and/or behaviors. Advertiser Perceptions utilizes regression analysis to show relationships between selection criteria and their influence on plans to buy. The analysis determines which criteria have the greatest impact on achieving the desired results.**

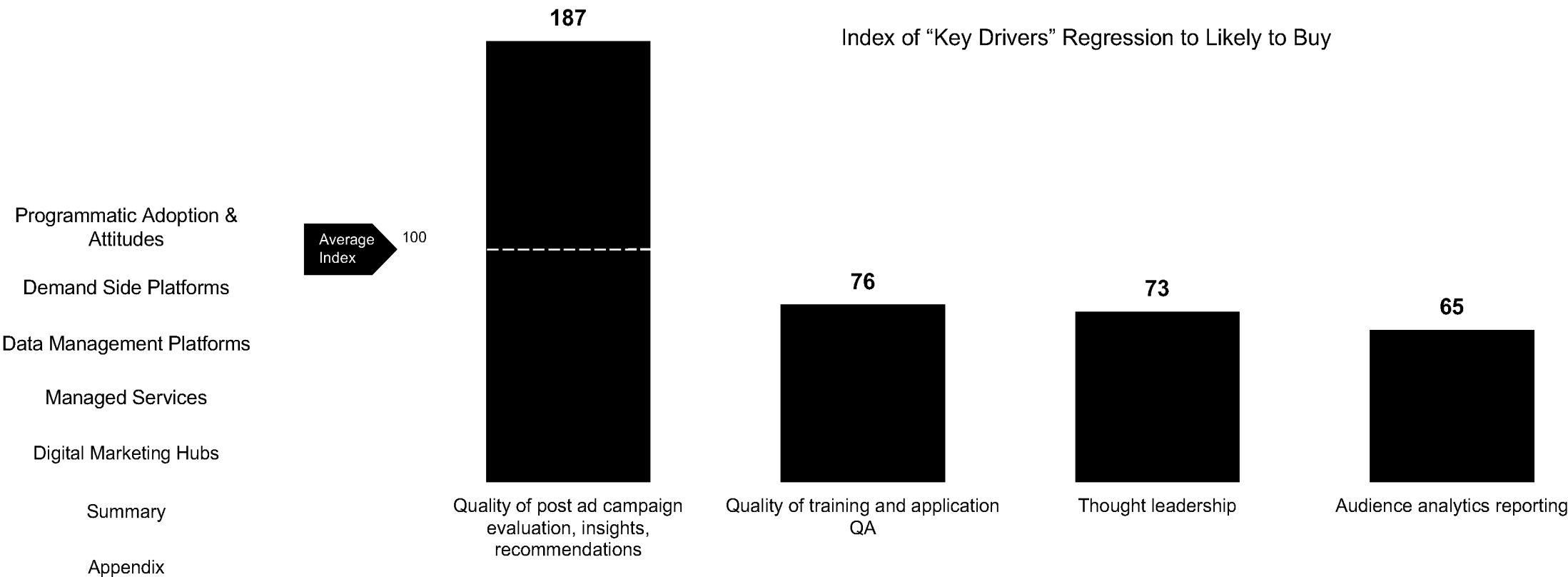
DBM leads across board in top 3 selection criteria

Highly Impressed with Demand Side Platform (Among Top 10 Used)  
Index of Percent Rating 8-10

	Audience scale or reach			API and integrations			QA/Troubleshooting capabilities		
Marketplace Overview	1	 DoubleClick Bid Manager by Google	140	1	 DoubleClick Bid Manager by Google	129	1	 DoubleClick Bid Manager by Google	121
	2	amazon	134	2	 MediaMath	122	2	 MediaMath	115
	3	theTradeDesk	130	3	amazon	110	3	theTradeDesk	114
Programmatic Adoption & Attitudes	4	 MediaMath	127	4	theTradeDesk	107	4	DataXu Data. Insight. Action.	112
	5	 Adobe Advertising Cloud	98	5	 Adobe Advertising Cloud	95	5	amazon	108
	6	centre	90	6	 rocketfuel	86	6	 Adobe Advertising Cloud	99
Data Management Platforms	7	 rocketfuel	86	6	centre	86	6	centre	99
	8	BrightRoll <small>by Yahoo!</small>	85	6	DataXu Data. Insight. Action.	86	8	 rocketfuel	96
	9	AppNexus	83	9	BrightRoll <small>by Yahoo!</small>	83	9	BrightRoll <small>by Yahoo!</small>	74
Managed Services	10	DataXu Data. Insight. Action.	59	10	AppNexus	80	10	AppNexus	73
Digital Marketing Hubs									
Summary									
Appendix									

Q: How would you rate each Demand Side Platform (DSP) on the following criteria?  
Scale: (1-3=Not Very Impressed; 4-7=Moderately Impressed; 8-10=Highly Impressed)  
Base: Considering Demand Side Platform in the Coming Year (Variable Base)

# Quality of campaign analysis is a critical driver of selection








Q: How likely are you to actually use each of the Demand Side Platforms (DSPs) you said you are considering for use in the coming year?  
Base: Total Respondents  
Q: Based on your own experience, please rate each Demand Side Platform's (DSP's) research and insights efforts in communicating its value as an advertising vehicle at each stage in the campaign.  
Base: Considering Demand Side Platform in the Coming Year (Variable Base)  
**Regression Analysis is a statistical method designed to derive the relationship between characteristics and/or behaviors. Advertiser Perceptions utilizes regression analysis to show relationships between selection criteria and their influence on plans to buy. The analysis determines which criteria have the greatest impact on achieving the desired results.**

# DBM ahead of competitors in post-ad campaign

Highly Impressed with Demand Side Platform (Among Top 10 Used)  
Index of Percent Rating 8-10

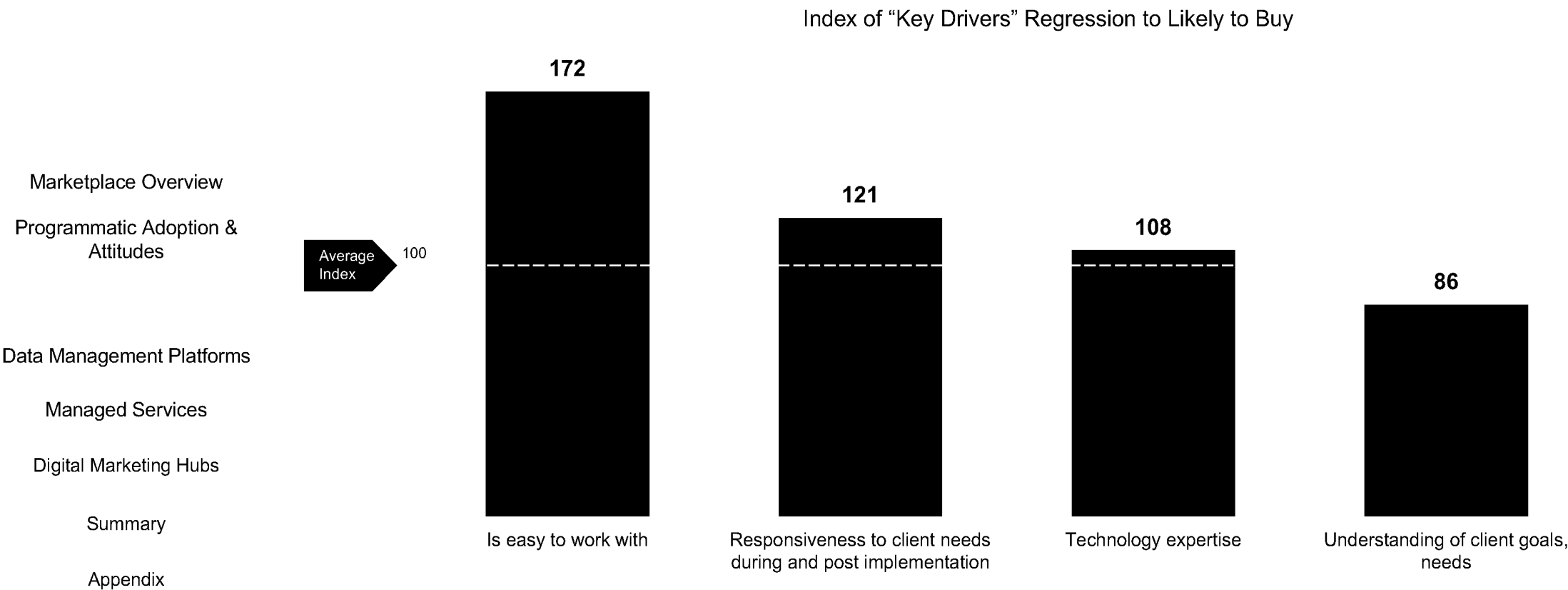
Quality of post ad campaign evaluation,  
insights, recommendations

- Marketplace Overview
- Programmatic Adoption & Attitudes
- Data Management Platforms
- Managed Services
- Digital Marketing Hubs
- Summary
- Appendix

1	 DoubleClick Bid Manager <small>by Google</small>	120
2	amazon	112
3		110
4	theTradeDesk	102
5	 BrightRoll <small>by Yahoo!</small>	95
6	 rocketfuel	92
7	centre	91
8	 DataXu <small>Data. Insight. Action.</small>	83
9	AppNexus	81
10	 Adobe Advertising Cloud	78

Q: Based on your own experience, please rate each Demand Side Platform's (DSP's) research and insights efforts in communicating its value as an advertising vehicle at each stage in the campaign.  
Scale: (1-3=Not Very Impressed; 4-7=Moderately Impressed; 8-10=Highly Impressed)  
Base: Considering Demand Side Platform in the Coming Year (Variable Base)

# Working with a DSP: What advertisers value most: Make it easy, be responsive, have tech expertise





















Q: How likely are you to actually use each of the Demand Side Platforms (DSPs) you said you are considering for use in the coming year?  
Base: Total Respondents  
Q: Based on your own experience, please rate each Demand Side Platform's (DSP's) sales team based on the following sales capabilities.  
Base: Considering Demand Side Platform in the Coming Year (Variable Base)  
**Regression Analysis is a statistical method designed to derive the relationship between characteristics and/or behaviors. Advertiser Perceptions now utilizes regression analysis to show relationships between selection criteria and their influence on plans to buy. The analysis determines which criteria have the greatest impact on achieving the desired results.**



# Ease of working relationship with DSP is a key factor for advertisers, but challenge for DBM

























Highly Impressed with Demand Side Platform (Among Top 10 Used)  
Index of Percent Rating 8-10

	Is easy to work with			Responsiveness to client needs during and post implementation			Technology expertise		
Marketplace Overview	1	amazon	117	1	centre	115	1	 DoubleClick Bid Manager by Google	131
	2	theTradeDesk	110	2	amazon	114	2	amazon	120
	3	 Data. Insight. Action.	105	3	 MediaMath	107	3	centre	106
Programmatic Adoption & Attitudes	4	 DoubleClick Bid Manager by Google	104	4	 DoubleClick Bid Manager by Google	102	4	theTradeDesk	103
	5	 MediaMath	103	5	theTradeDesk	101	5	 MediaMath	99
Data Management Platforms	6	 Adobe Advertising Cloud	101	6	 Adobe Advertising Cloud	99	6	 Data. Insight. Action.	98
Managed Services	7	 rocketfuel	97	7	 Data. Insight. Action.	95	7	 Adobe Advertising Cloud	97
Digital Marketing Hubs	8	centre	96	8	AppNexus	85	8	 BrightRoll by YAHOO!	87
	9	AppNexus	88	9	 rocketfuel	83	9	AppNexus	75
Summary	10	 BrightRoll by YAHOO!	71	10	 BrightRoll by YAHOO!	73	10	 rocketfuel	72
Appendix									

Q: Based on your own experience, please rate each Demand Side Platform's (DSP's) sales team based on the following sales capabilities.  
Scale: (1-3=Not Very Impressed; 4-7=Moderately Impressed; 8-10=Highly Impressed)  
Base: Considering Demand Side Platform in the Coming Year (Variable Base)

# Stronger with agencies, DBM at merely average in 2 of 3 key sales criteria













Sales Coverage by Demand Side Platforms (Among Top 10 Used)  
Index of Percent

	Market or Training Presentations			Received collateral			Any communication		
Marketplace Overview	1		156	1	amazon	184	1		121
	2		130	2	 DoubleClick Bid Manager <small>by Google</small>	145	2	amazon	109
	3		104	3		127	3	 DoubleClick Bid Manager <small>by Google</small>	105
Programmatic Adoption & Attitudes	4	amazon	100	4	 BrightRoll <small>by YAHOO!</small>	107	4		102
	5		96	5		91	5		99
	6	 DoubleClick Bid Manager <small>by Google</small>	90	6		81	6		98
Data Management Platforms	7	 DataXu <small>Data. Insight. Action.</small>	81	7	 Adobe Advertising Cloud	79	7	 BrightRoll <small>by YAHOO!</small>	92
Managed Services	8	 BrightRoll <small>by YAHOO!</small>	77	8		77	8	 DataXu <small>Data. Insight. Action.</small>	91
Digital Marketing Hubs	9	AppNexus	66	9	 DataXu <small>Data. Insight. Action.</small>	63	9	AppNexus	86
Summary	10	 Adobe Advertising Cloud	58	10	AppNexus	48	10	 Adobe Advertising Cloud	84
Appendix									

Q: For each Demand Side Platform (DSP), please indicate whether in the past 90 days you have...  
Base: Considering Demand Side Platform in the Coming Year (Variable Base)

# DBM trails competitors with in-person meetings, but excels in web conference meetings

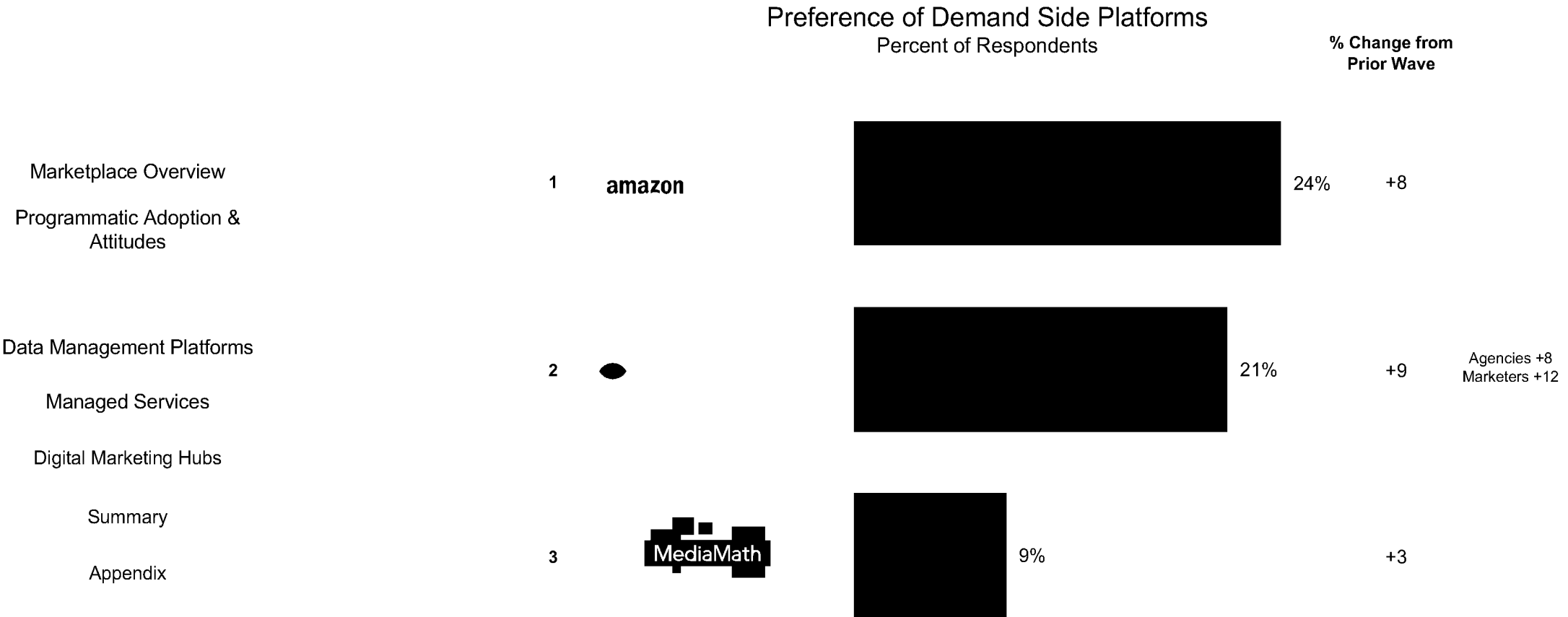
Sales Coverage by Demand Side Platforms (Among Top 10 Used)  
Index of Percent

	Meetings (net)*			Web/phone meetings		
Marketplace Overview	1		139	1	 DoubleClick Bid Manager <small>by Google</small>	133
	2	amazon	112	2	theTradeDesk	128
	3	theTradeDesk	111	3	centre	112
Programmatic Adoption & Attitudes	4		110	4	amazon	108
	5	centre	106	5	 BrightRoll <small>by Yahoo!</small>	98
	6	 DataXu <small>Data. Insight. Action.</small>	88	6	AppNexus	97
Data Management Platforms	7	 DoubleClick Bid Manager <small>by Google</small>	68	7	 DataXu <small>Data. Insight. Action.</small>	96
	8	 BrightRoll <small>by Yahoo!</small>	66	7		96
	9	 Adobe Advertising Cloud	62	9		91
Managed Services	10	AppNexus	55	10	 Adobe Advertising Cloud	72
Digital Marketing Hubs						
Summary						
Appendix						

Q: For each Demand Side Platform (DSP), please indicate whether in the past 90 days you have...  
Base: Considering Demand Side Platform in the Coming Year (Variable Base) \*Meetings (net): Net of in-person individual or small group meetings, presentations, and meeting with sales person at events

# Who is the most preferred DSP?

## AAP, followed by DBM









- Marketplace Overview
- Programmatic Adoption & Attitudes
- Data Management Platforms
- Managed Services
- Digital Marketing Hubs
- Summary
- Appendix

Q: If you were to only send out one RFP for an advertising campaign, which of these Demand Side Platforms (DSPs) would you choose?  
Base: Intending to Use Demand Side Platform in the Coming Year (Fixed Base)  
Q: What does [BRAND] do or offer that makes them your preferred partner?  
Q: Where can [BRAND] be even better or improve?  
Base: Selected Brand As Preferred (Variable Base)

# DBM moving up to lead cluster for Net Promoter Score

Likelihood to Recommend Demand Side Platforms (Among Top 10 Used)  
Percent of Respondents/Score




































			Promoters (%)	Detractors (%)	Net Promoter Score (NPS)	Rank from Prior Wave
Marketplace Overview	1	theTradeDesk	41%	21%	20	1
	2	amazon	40%	23%	18	6
Programmatic Adoption & Attitudes	2	 DoubleClick Bid Manager by Google	38%	20%	18	7
	4	 MediaMath	37%	21%	16	5
Data Management Platforms	5	 rocketfuel	42%	26%	15	3 (tie)
	5	 Adobe Advertising Cloud	38%	23%	15	8 (tie)
Digital Marketing Hubs	7	AppNexus	37%	25%	12	3 (tie)
Summary	8	centre	34%	25%	9	8 (tie)
	8	 DataXu <small>Data. Insight. Action.</small>	40%	31%	9	2
Appendix	10	 BrightRoll <small>by YAHOO!</small>	34%	28%	6	10

**Net Promoter Score**  
Equals Promoters Less Detractors  
Promoters – Rated 9-10  
Passives – Rated 7-8  
Detractors – Rated 0-6

Q: How likely would you be to recommend to a colleague the Demand Side Platform(s) (DSPs) you have used in the past year?  
Base: Use Demand Side Platforms (Variable Base)

In summary: Amazon and Google at/or near top across board

Key Metrics Among Top 10-Used Demand Side Platforms  
Percent of Respondents/Score

	Familiarity (8-10)			Usage			Consideration (8-10)			Buying Intention (8-10)			Net Promoter Score (NPS)		
Marketplace Overview	1	amazon	49%	1	amazon	39%	1	amazon	53%	1	 DoubleClick <small>By Google</small>	41%	1	theTradeDesk	20
Programmatic Adoption & Attitudes	2	 DoubleClick <small>By Google</small>	47%	2	 DoubleClick <small>By Google</small>	35%	2	 DoubleClick <small>By Google</small>	47%	2	amazon	39%	2	 DoubleClick <small>By Google</small>	18
	3	 rocketfuel	44%	3	 rocketfuel	24%	3	 rocketfuel	42%	3	 rocketfuel	34%	2	amazon	18
	4	 BrightRoll <small>By Yahoo!</small>	44%	3	 MediaMath	24%	4	 BrightRoll <small>By Yahoo!</small>	40%	3	 BrightRoll <small>By Yahoo!</small>	34%	4	 MediaMath	16
Data Management Platforms	5	 MediaMath	43%	5	 BrightRoll <small>By Yahoo!</small>	22%	5	 Adobe Advertising Cloud	39%	5	theTradeDesk	32%	5	 rocketfuel	15
Managed Services	6	theTradeDesk	40%	6	 Adobe Advertising Cloud	21%	6	theTradeDesk	38%	5	 MediaMath	32%	5	 Adobe Advertising Cloud	15
Digital Marketing Hubs	6	 Adobe Advertising Cloud	40%	6	theTradeDesk	21%	6	 MediaMath	38%	7	 Adobe Advertising Cloud	31%	7	AppNexus	12
Summary	6	 centre	40%	8	 DataXu <small>Data. Insight. Action.</small>	20%	8	AppNexus	35%	8	AppNexus	29%	8	 centre	9
	8	AppNexus	36%	9	AppNexus	19%	9	 DataXu <small>Data. Insight. Action.</small>	33%	9	 centre	28%	8	 DataXu <small>Data. Insight. Action.</small>	9
Appendix	9	 DataXu <small>Data. Insight. Action.</small>	35%	10	 centre	16%	10	 centre	31%	10	 DataXu <small>Data. Insight. Action.</small>	27%	10	 BrightRoll <small>By Yahoo!</small>	6

# Executive Summary

- Familiarity: AAP and DBM continue to lead
- DBM and AAP still the most used DSPs
  - Future intentions: DBM and AAP in their own tier at the top
- What drives DSP selection? Audience scale is key
  - DBM leads across board in top 3 selection criteria
- Quality of campaign analysis is a critical driver of selection
  - DBM ahead of competitors in post-ad campaign
- Ease of working relationship with DSP a key factor for advertisers, but challenge for DBM
- Who is the most preferred DSP? AAP, followed by DBM
- DBM moves into lead cluster for Net Promoter Score

- Marketplace Overview
- Programmatic Adoption & Attitudes
- Demand Side Platforms
- Data Management Platforms
- Managed Services
- Digital Marketing Hubs
- Appendix

# DBM Strengths and Challenges

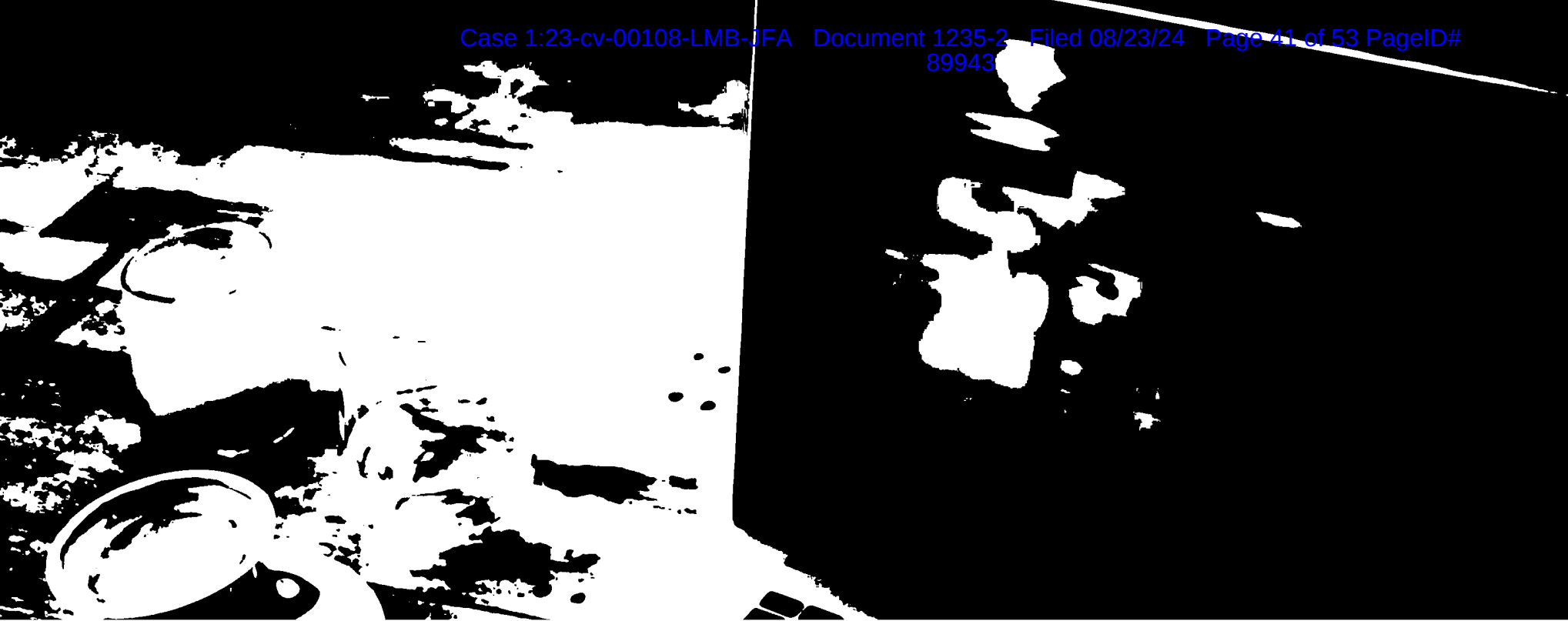
## Strengths

- Top of mind in all areas related to consideration: familiarity, usage, consideration, intention
- Leading now in all 3 selection criteria that drive DSP selection
- Perceived to be leading in post-campaign insight delivery

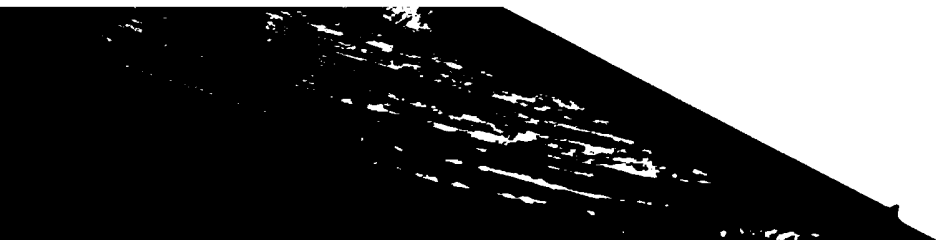
## Challenges

- AAP continues to vie for leadership in consideration and ratings criteria
  - And DBM trails AAP in the “most preferred” DSP metric
- DBM does not excel in “easy to work with,” and this is a critical intention driver
- Perhaps related to “ease” challenge, DBM has a cluster of competitors for NPS leadership

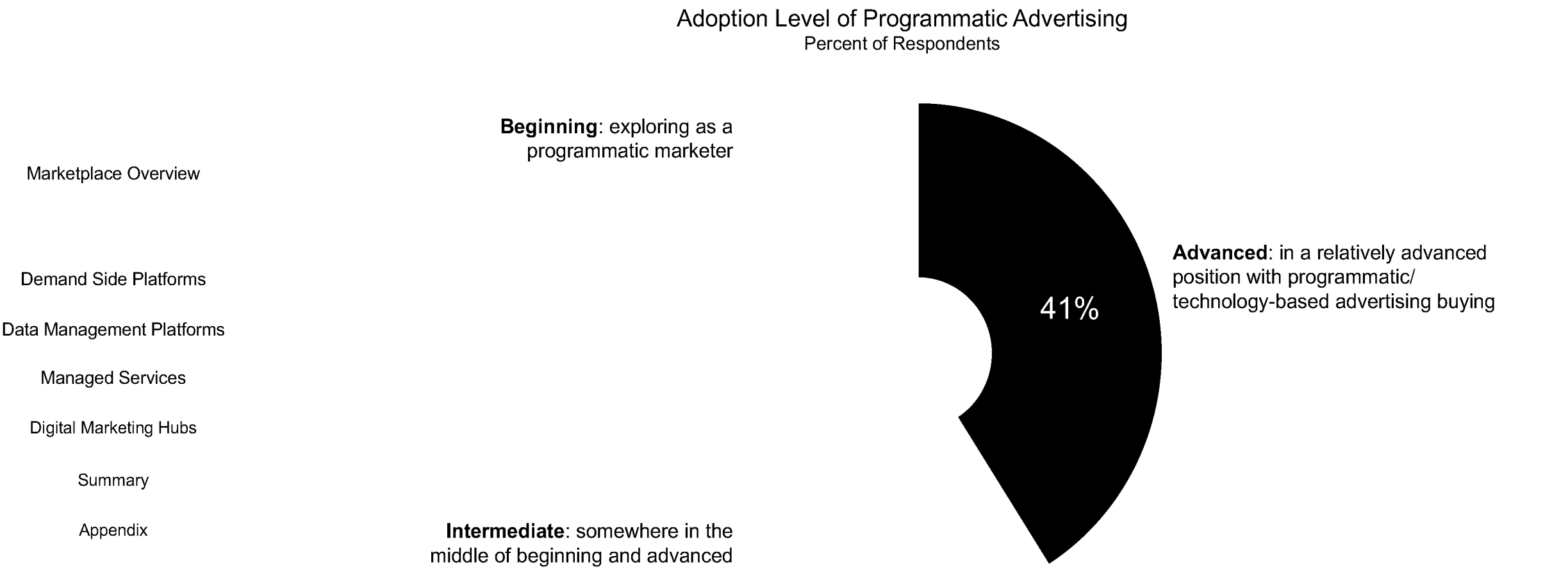




# Appendix



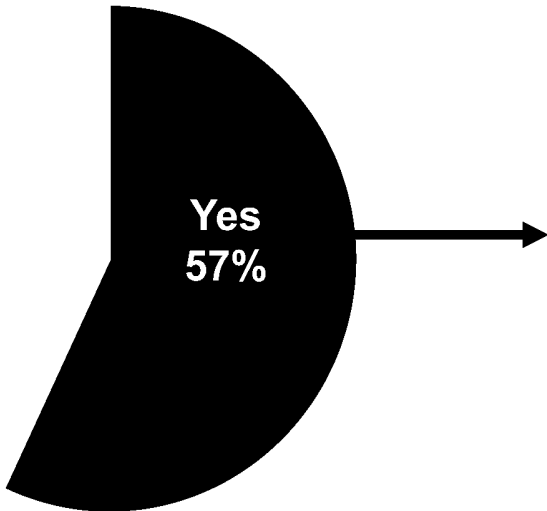
# Most see themselves as fairly well-versed in programmatic



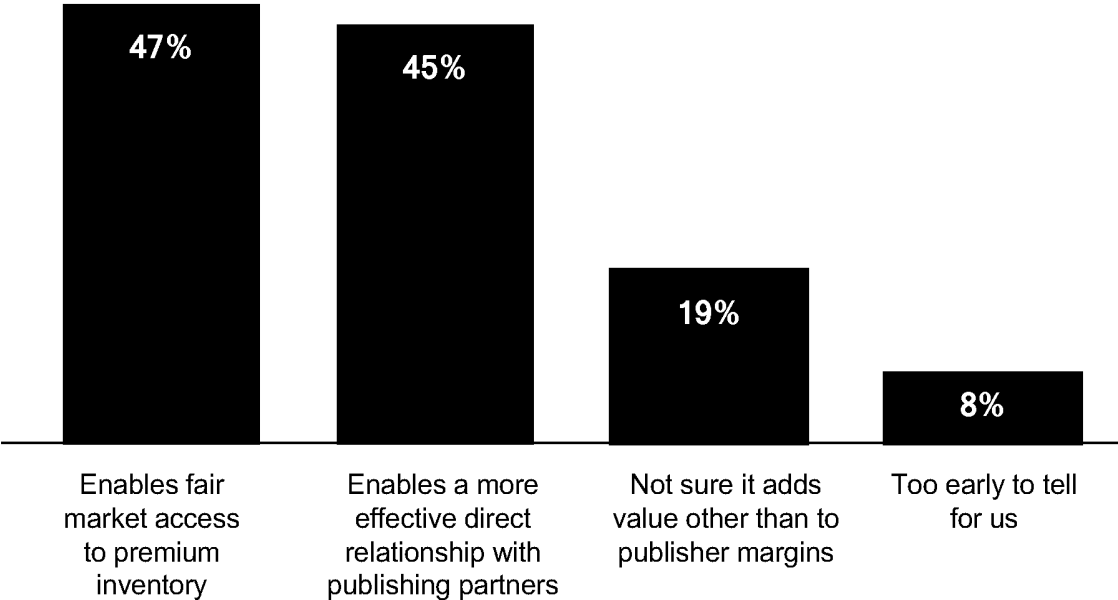
Q: Which of the following best characterizes [your agency's/your company's] experience and skills in programmatic?  
Base: Total Programmatic Respondents

# Header bidding: advertiser see it as big plus

Are you familiar with header bidding?  
Percent of Respondents














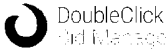

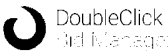















What is the value of header bidding for your advertising campaigns?  
Percent of Respondents



Q: Are you familiar with header bidding?  
Base: Total Programmatic Respondents  
Q: What is the value of header bidding for your advertising campaigns?  
Base: Familiar With Header Bidding

# As newer categories, advanced TV, social, audio, native, OOH have less usage among DSPs

Demand Side Platform Usage Among Ad Type/Format (Top 10 Overall)  
Percent of Respondents









	Advanced/Connected TV			Social			Audio		
Marketplace Overview	1	 Adobe Advertising Cloud	31%	1	 DoubleClick Ad Manager <small>by Google</small>	27%	Agencies 23% Marketers 33%		
	2	 theTradeDesk	27%	2	 amazon	26%	2	 theTradeDesk	21%
	2	 amazon	27%	3	 theTradeDesk	23%	2	 Bidtellect	21%
Programmatic Adoption & Attitudes	5	 videology	24%	4	 rocketfuel	22%	2	 MediaMath	21%
	5	 DoubleClick Ad Manager <small>by Google</small>	24%	6	 dstillery	21%	5	 DoubleClick Ad Manager <small>by Google</small>	20%
Data Management Platforms	5	 VIANT.	24%	6	 drawbridge	21%	6	 rocketfuel	19%
Managed Services	5	 TURN	24%	8	 MediaMath	20%	6	 OpenX	19%
Digital Marketing Hubs	9	 MediaMath	23%	8	 AppNexus	20%	8	 Adobe Advertising Cloud	18%
	9	 TREMOR VIDEO	23%	8	 BrightRoll <small>by Yahoo!</small>	20%	8	 drawbridge	18%
Summary	9	 OpenX	23%	8	 TREMOR VIDEO criteo	20%	8	 centre	18%
Appendix									

Q: For which type of advertising would you use each Demand Side Platform (DSP) you are familiar with?  
Base: Familiar with Demand Side Platform (Variable Base)

# As newer categories, advanced TV, social, audio, native, OOH have less usage among DSPs

Demand Side Platform Usage Among Ad Type/Format (Top 10 Overall)  
Percent of Respondents

- Marketplace Overview
- Programmatic Adoption & Attitudes
- Data Management Platforms
- Managed Services
- Digital Marketing Hubs
- Summary
- Appendix

Native				Digital Out-of-Home			
1	 DoubleClick Ad Manager by Google	29%		1	amazon	15%	
1	amazon	29%		2	 DoubleClick Ad Manager by Google	14%	Agencies 12% Marketers 17%
1	theTradeDesk	29%		3	 Adobe Advertising Cloud	11%	
4	Bidtellect	26%		3	OpenX	11%	
5	 rocketfuel	25%		3	Bidtellect	11%	
6	VIAANT.	23%		6	theTradeDesk	10%	
7	drawbridge	22%		6	AppNexus	10%	
7	 DSP by AOL	22%		6	 MediaMath	10%	
7	 MediaMath	22%		9	VIAANT.	9%	
7	 Adobe Advertising Cloud	22%		9	drawbridge	9%	

Q: For which type of advertising would you use each Demand Side Platform (DSP) you are familiar with?  
Base: Familiar with Demand Side Platform (Variable Base)

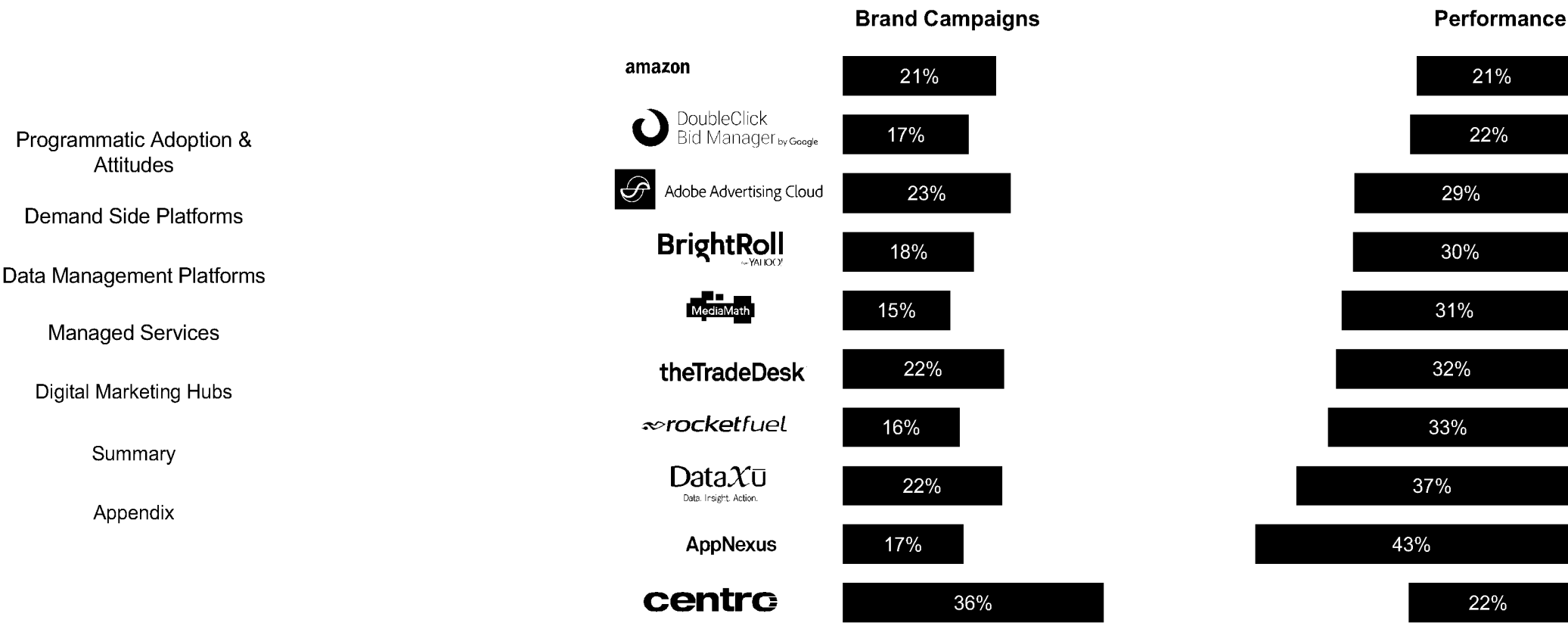
Brand Characterization

		DSP	DMP	Digital Marketing Hub	Ad Networks	Supply Side Platform	Agency Trading Desk	Managed Service	Other/ Don't Know
Marketplace Overview	Amazon Advertising Platform	18%	15%	23%	42%	15%	14%	19%	10%
	Accordant Media	10%	12%	16%	18%	11%	12%	10%	39%
	Accuen	10%	13%	15%	18%	10%	15%	7%	37%
	Adobe Audience Manager	10%	20%	22%	23%	11%	12%	14%	21%
	AppNexus	18%	16%	16%	19%	15%	12%	12%	26%
	BrightRoll (Yahoo)	22%	16%	21%	35%	13%	14%	13%	14%
	Cadreon	10%	12%	15%	16%	12%	14%	8%	37%
	Centro	14%	14%	15%	25%	10%	12%	13%	29%
	Criteo	13%	11%	16%	20%	11%	9%	10%	33%
	DataXu	19%	18%	18%	19%	12%	11%	10%	26%
Demand Side Platforms	Experian	11%	21%	19%	17%	14%	11%	18%	22%
	DoubleClick Bid Manager	25%	20%	18%	29%	15%	17%	15%	10%
	Index Exchange	8%	11%	19%	17%	12%	16%	7%	34%
Data Management Platforms	Krux (now a part of Salesforce)	9%	17%	19%	18%	11%	11%	9%	33%
	Marketo	9%	14%	24%	16%	12%	9%	13%	30%
Managed Services	MediaMath	21%	19%	20%	22%	12%	13%	11%	20%
	OpenX	12%	10%	17%	19%	15%	13%	8%	34%
Digital Marketing Hubs	Oracle/Bluekai	15%	27%	24%	21%	16%	14%	20%	12%
	ONE by AOL Audience	16%	14%	17%	29%	11%	12%	12%	24%
	Rocket Fuel	24%	19%	17%	28%	12%	12%	12%	17%
Summary	Rubicon	19%	15%	15%	23%	17%	18%	10%	22%
	The Trade Desk	19%	15%	17%	20%	10%	32%	10%	15%
Appendix	Tremor Video	16%	15%	17%	32%	12%	11%	11%	20%
	Adobe Ad Cloud (formerly TubeMogul)	17%	20%	22%	25%	12%	13%	15%	18%
	Turn	20%	16%	18%	20%	10%	11%	8%	29%
	Varick Media	11%	10%	14%	19%	12%	13%	12%	34%
	Viant	11%	11%	16%	20%	10%	9%	9%	36%
	Xaxis	12%	14%	16%	17%	11%	15%	9%	33%

Q100a: How would you characterize the following brands?  
Base: Total Programmatic Respondents

# Adobe, Google, Amazon most likely to be used for brand or both brand & performance

Type of Campaign Demand Side Platform Primarily Used For (Among Top 10 Used)  
Percent of Respondents



Q: Among the Demand Side Platforms (DSPs) you have used in the past year, what type of campaigns are they primarily used for?  
Base: Used Demand Side Platform in Past Year (Variable Base)

# How the best brands are delivering ad tech implementation



*“Their ad stack is so integrated across products on buyer, seller, and publisher sides that it’s relatively simple to activate strong campaigns quickly.”*  
- Agency Director

*“Not a buying tool, but do a great job gaining efficiencies for advertisers and help manage very large budgets.”*  
- Agency Planner

Marketplace Overview

*“Placement verification.”*  
- Agency President

Demand Side Platforms

*“Provides very good reporting on the ads that we buy and real time, which gives us the ability to make adjustments while in flight.”*  
- Marketer VP

*“I mostly just like their interface.”*  
- Agency Director

Data Management Platforms

Managed Services

*“They offer the most options to us and are able to support us very well.”*  
- Agency Supervisor

Digital Marketing Hubs



Summary

*“It is surprisingly the most likely to target our audience desired.”*  
- Marketer Executive

Appendix

*“They have all the resources and data analysis that we need.”*  
- Marketer Manager

*“They know their exact audience makeup.”*  
- Agency VP

Q: What do they do especially well?  
Base: Total Programmatic Respondents



# How the best brands are delivering ad tech implementation

theTradeDesk®



Marketplace Overview

*“[They] allow for data transparency.”*  
- Agency Director

*“I believe they have the best algos & excellent  
proprietary data.”*  
- Agency VP

Demand Side Platforms

*“Great interface and platform connects to all major tech vendors.”*  
- Agency Director

*“They are smaller and really give great service, their  
tracking is spot on.”*  
- Agency Director

Data Management Platforms

Managed Services

*“They seem to be ahead of the curve when it comes to managing  
things like targeting, scale, performance...I think all of them need to  
lead with verification and fraud abatement tools. Location verification  
is an example of an area where these guys need improvement..”*

*“As a whole it seems like when it comes to results they always seem  
like the top tier in this regard (especially when it comes to the DSP  
realm). As a whole you very rarely ever see any flack from the  
company because again they are an authority in this arena and for  
good reason to be candid. I also think the fact that they are  
independent is also another reason why as a company they are able  
to do what they do. To be candid, they really are trailblazers in  
retrospect considering this point.”*

Digital Marketing Hubs

- Agency Director

- Marketer Executive

Summary

Appendix

*“Customer service is top notch. It costs more to use  
them but we feel we get the value back in service..”*  
- Agency VP

*“They have algorithms and proprietary data that are industry leading”*  
- Marketer Director

Q: What do they do especially well?  
Base: Total Programmatic Respondents

# How the best brands are delivering ad tech implementation

**centre**

**facebook**

**Aol.**

Marketplace Overview

*“They are reliable and always hear us and our requests.”*  
- Agency Director

Demand Side Platforms

*“They have a hands-off (self managed) approach that works very well for us, but at any time, we can also switched over to managed services if our workload gets to hectic. And they provide great customer service compared to most self managed platforms when questions come up. They are also very helpful during the planning phase, helping us to maximize the use of their tools.”*

*“Targeting capabilities.”*  
- Marketer Executive

Data Management Platforms

Managed Services

*“While their platform is limited in terms of placement they do have a dependable audience with a lot of unique targeting options. We like that we can start an ad campaign almost immediately and narrowly target our desired audience. Their reporting is adequate..”*  
- Agency Director

Digital Marketing Hubs

- Marketer Manager

Summary

*“A lot of data partners and great support.”*  
- Agency Director

Appendix

*“They understand our needs and resolve issues as soon as possible.”*  
- Agency Director

*“They can ingest our 3rd party data and provide audiences at scale.”*  
- Agency Supervisor

*“Predictive segments. And now with the Verizon partnership, it opens up more targeting capabilities.”*  
- Marketer Manager

*“Their account management team is very good. transparency, recommendations, relationship building, they’re on top of it when it comes to finding and fixing errors.”*  
- Marketer Manager

**YAHOO!**

*“They understand financial services and the needs/concerns in the space.”*  
- Agency VP

*“Better understanding of the requirements.”*  
- Marketer Director

Q: What do they do especially well?  
Base: Total Programmatic Respondents

# 72% of marketers still consider the agency trading desk model valid

- Programmatic Adoption & Attitudes
- Demand Side Platforms
- Data Management Platforms
- Managed Services
- Digital Marketing Hubs
- Summary
- Appendix

*“Slightly **outdated** and might become obsolete in the near future, but **still contains a great deal of insight.**”*

- VP

*“I feel ATDs are **antiquated** with the availability of programmatic advertising. I now see them as an **unnecessary expense and step** when buying our advertising.”*

- Director

*“There is still an **advantage** to using the resources available from this type of buying platform especially for companies that have a **limited budget.**”*






















- Director

*“Most advanced direct capabilities are now **available through web based formats.**”*

- Strategic Executive

Q: Is the agency trading desk model still valid? Please explain your response.  
Base: Marketers Involved in Programmatic

# DSP Usage Among Ad Type/Format

		Percent of Respondents						Top Format By Brand	
		Display	Mobile	Video	Advanced TV	Audio	Native	Social	Digital OOO
Marketplace Overview	 Adobe Advertising Cloud	36%	37%	41%	31%	18%	22%	19%	11%
	 Audience Buyer	33%	35%	29%	27%	22%	21%	22%	11%
	 amazon	51%	50%	35%	27%	23%	29%	26%	15%
	 AppNexus	34%	35%	32%	21%	16%	21%	20%	10%
	 Biddtellect	25%	26%	23%	21%	21%	26%	17%	11%
	 BrightRoll	31%	32%	47%	20%	15%	19%	20%	7%
	 centre	37%	35%	26%	19%	18%	19%	18%	8%
	 criteo	35%	30%	27%	16%	15%	19%	20%	7%
	 DataXu	39%	34%	29%	17%	15%	18%	14%	7%
	 drawbridge	30%	32%	25%	20%	18%	22%	21%	9%
Data Management Platforms	 dstillery	32%	28%	24%	19%	17%	19%	21%	8%
	 DoubleClick	54%	49%	45%	24%	20%	29%	27%	14%
Managed Services	 Google Ad Manager	43%	42%	34%	23%	21%	22%	20%	10%
	 1 DSP	54%	36%	39%	18%	10%	22%	18%	6%
Digital Marketing Hubs	 OpenX	37%	30%	25%	23%	19%	16%	16%	11%
	 rocketfuel	44%	39%	38%	19%	19%	25%	22%	8%
Summary	 theTradeDesk	43%	36%	35%	27%	21%	29%	23%	10%
	 TREMOR VIDEO	17%	24%	55%	23%	14%	18%	20%	8%
	 TURN	37%	30%	30%	24%	16%	22%	16%	6%
	 VIANT.	32%	31%	30%	24%	16%	23%	18%	9%
	 videology	20%	18%	51%	24%	17%	19%	14%	9%

Q: For which type of advertising would you use each Demand Side Platform (DSP) you are familiar with?  
Base: Familiar with Demand Side Platform (Variable Base)



## What Advertisers Think™

The More You Know  
The Stronger Your Brand  
The More You'll Sell™

